## Create and Manage Catalog Items

## About this Guide

This guide is intended to show suppliers how to create, manage, and update Catalog Items. Updates to catalog items can include updating pricing, adding new items, removing old items, and more. Please coordinate with the Flynn team to understand your responsibility with managing catalogs.

This guide contains the following sections:
Creating Catalog Items
Single Catalog Upload
Bulk Catalog Upload
Manage Catalog Items

## Creating Catalog Items

1. Login to the Coupa Supplier Portal (CSP). On the main menu, click on the **Catalogs** tab. If you are connected to more than one Coupa customer, select Flynn from the **Select Customer** dropdown menu. Then select **Create**.
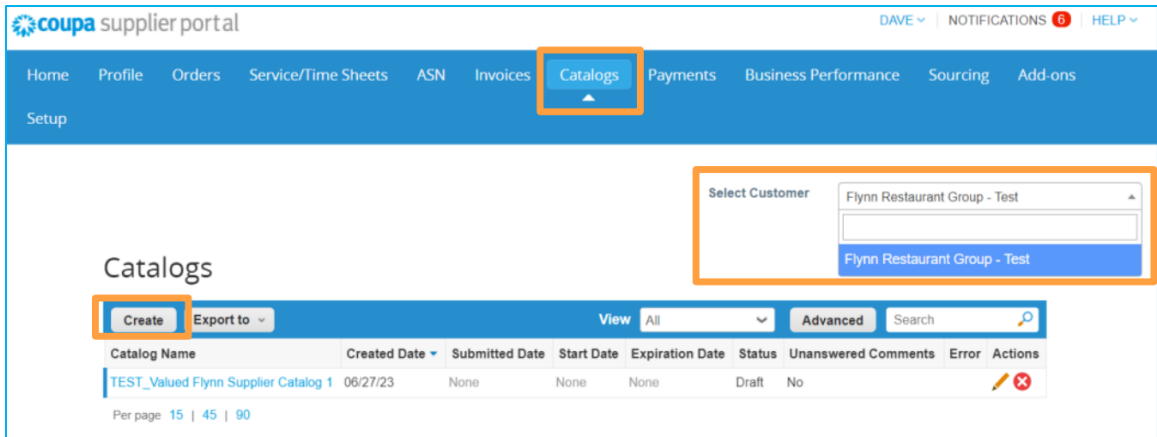


2. From the Create screen, you will need to add a **Catalog Name**. Other fields are optional but recommended

3. At the bottom of the page, you will see the Items included in the Catalog. To add items to the new catalog you have the option to **Create** new catalogs which will be done one by one or **Load from file** will allow a bulk upload of items and changes.



# Single Catalog Upload

1. To create a catalog Item, click on **Create**. Inside under **Catalog Item** you will be asked to fill out required fields such as the **Name** of the item, **Description** of the item, and **Units of Measure** (UOM). Please note that adding an Image is *strongly recommended*.



2. Under the **Supplier Item Attributes**, fill out the required fields that include the **Part Number**, **Price**, and **Currency**. Please fill out as many fields as you can, as this will provide a better purchasing experience for our Flynn team.



3. Once all those fields have been filled click **Save**. You will be able to view the Catalog you just created in the table view.

# Bulk Catalog Upload

1. To mass upload catalog items from a file, click on **Load from file**. Click on the **Download** drop-down and select either the **CSV Plain** option or the **CSV for Excel** option to download a template for you to fill out in order to accurately bulk upload items to the new catalog. (NOTE: The field names in the template match the options presented in the system in Option 1)



2. Open the CSV file. Once opened, fill in the mandatory fields marked by the asterisk next to the column name (*). Note that each row will be a different item and will become the details for the catalog.



3. In the CSV, photos must have a public URL for them to show. Attaching a photo is *highly recommended*.

4. Once all the items are added to the file and their mandatory details are included, upload the filled-out CSV file by selecting the Choose File button. Once selected, click on Start Upload.



5. If you get an **Error Generating Sample** after uploading your file, simply click on **Back**, correct the error within the uploaded CSV file, and then re-upload the file. If you encounter an error please reach out to your Flynn contact.

6. Once your upload is complete, Coupa will scan the uploaded file and show you the **Verify Data** screen so you can check the items extracted from the file.



7. Once you are satisfied with your Data, scroll down and select Finish Upload. An **Upload Completed Successfully** message will appear. Click on the **Done** button to proceed.



8. Lastly, you will be prompted to the Catalog page where you can **Save**, **Edit** or Publish your Catalog. To publish the newly created catalog, scroll down and locate the Public Catalog Button. Please note that you must publish your catalog in order for Flynn to view it. Flynn Procurement will have to approve the catalog before it is available in the Flynn Marketplace for purchase.

# Manage Catalog Items

1. If you would like to edit, delete, update or add a catalog Item, from the home page, navigate to the **Catalogs** Tab. Make sure to select Flynn Group from the **Select Customer** dropdown menu.

2. Select **Create.**

3.  Select the **Load From File** Button



4.  Select the **Export To** drop down and then select **CSV for Excel**. This will export the current catalog items available to Flynn to purchase.

5. Once you have the list exported and opened, you can add the items that need to be added as well as make changes to existing items.
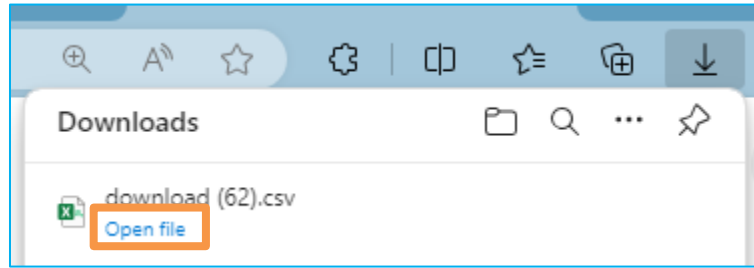


**PLEASE NOTE**: The only field that should be changed on an item is the price. Please **DO NOT** change any of the item numbers.

6. Make the necessary changes or additions to the catalog. Make sure to save the catalog file as a CSV.
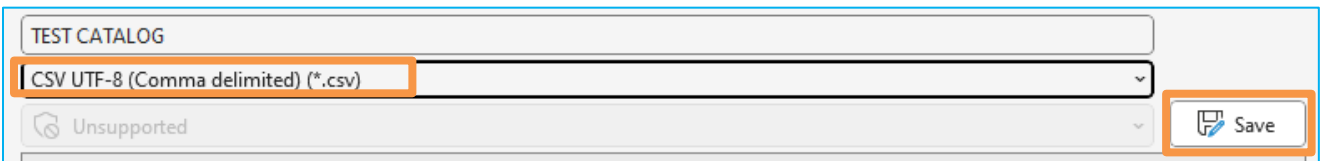


7. Navigate back to the Coupa Supplier Portal where you last left off. You should see Bulk Load Item Updates. Select the **Choose File** Button and then select the catalog file you just saved to upload.
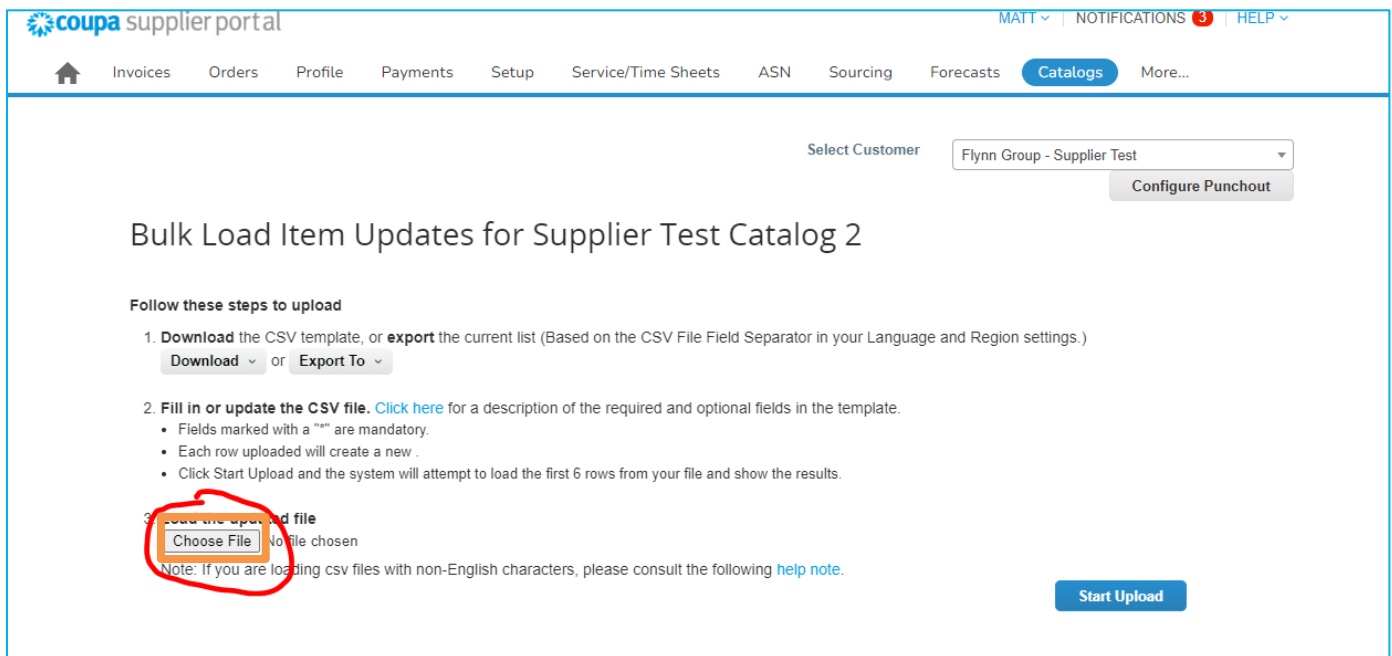
8. Once you have the updated catalog file selected, click **Start Upload.** Once the file uploads, you will be able to review the changes you've made to the catalog.



9. After reviewing your changes for accuracy, select **Submit for Approval**